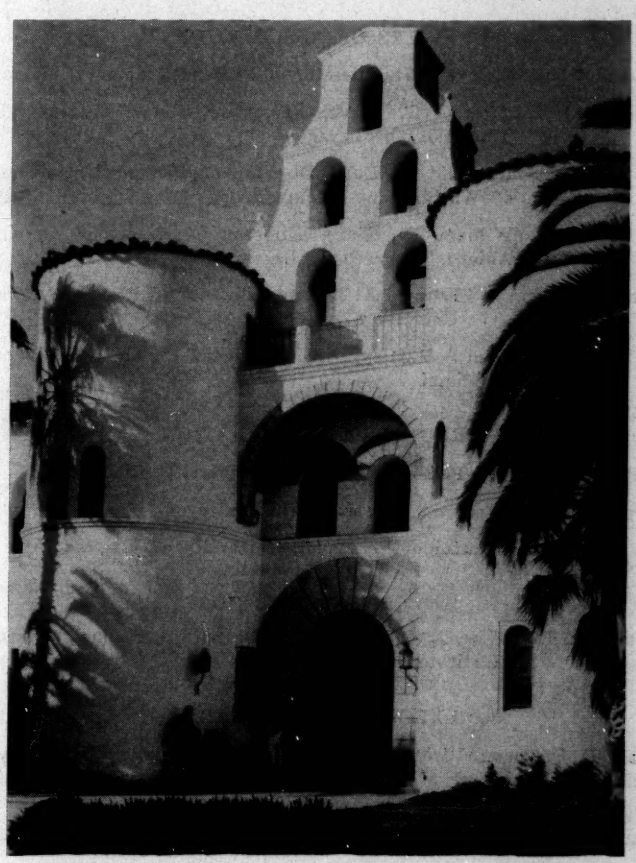
THE JOURNAL

OF THE

COLLEGE AND UNIVERSITY PERSONNEL ASSOCIATION

Volume 11 February, 1960 Number 2



Main Arch, Business Administration Building
San Diego State College

THE JOURNAL

of the
College and University Personnel Association

EDITOR

Kathryn G. Hansen, Executive Secretary
University Civil Service System of Illinois

OFFICERS OF ASSOCIATION

President. Orie E. Myers, Jr., Director of Personnel, Emory University

President-Elect. Charles T. Clark, System Personnel Advisor, The University of Texas

Vice President. Reginald D. Root, Director of Personnel, University of Washington (Membership)

Vice President. William D. Poore, Director of Personnel Services. Auburn University (Research)

Secretary-Treasurer. Edward A. Jackson, Director of Personnel, Miami University

Past President. Paul A Hartley, Director of Staff Personnel, University of Miami

DIRECTORS OF ASSOCIATION

Dorothy E. Everett, Personnel Analyst, University of California

George W. Fogg, Personnel Director, University of Maryland

Paul J. Jenkins, Director of Personnel, University of Virginia

1960 CONFERENCE HOST

Shelton F. King, Head, Office of Nonacademic Personnel, Carnegie Institute of Technology

EXECUTIVE SECRETARY

Donald E. Dickason, Director of Nonacademic Personnel, University of Illinois, and Director of University Civil Service System of Illinois

THE JOURNAL of the College and University Personnel Association is published four times each year. Editorial office: 1205 West California Street, Urbana, Illinois. Business office: 809 South Wright Street, Champaign, Illinois. Subscription rates: Free to members of the Association; $1.00 per year for libraries.

NOTES & QUOTES . . .

Our Cover

Our cover picture presents the Main Arch at the entrance to the Business Administration Building, San Diego State College. Many of the buildings on this campus portray the best types of Spanish colonial art and architecture, which is well suited to the landscape and climate of the Southern California region.

Eleventh Annual Short Course In College Business Management

Carnegie Corporation Grants will be available to a limited number of applicants for the 1960 session of the Short Course in College Business Management, The University of Omaha, July 25 to July 30, inclusive.

Each recipient must be a member of the business office staff of any institution of higher education.

Preference will be given to new participants.

To be eligible for a grant, an applicant must have had no work in similar courses at another institution.

He must be recommended by the president or secretary of the college business officers association of which he is a member, or by a member of the Advisory Committee of the Short Course in College Business Management.

The application must carry the certification of the president of the college that the candidate will attend the Short Course if the grant is awarded and that the candidate is a bona fide employee of the institution.

Application blanks may be obtained by writing to Mr. Donald E. Dickason, University of Illinois, 809 South Wright Street, Champaign, Illinois. The College and University Personnel Association may nominate candidates for this award; however, the final decisions concerning the awards are made by the University of Omaha Scholarship Committee.

The Professional Worker:

Does not require close direction. He directs himself, plans his own activities. He works independently.

Does not regard himself as an employee. He does not consider himself to be working for a

(Continued on Page iii)

THE JOURNAL

Vol. 11 February, 1960 No. 2

CONTENTS

Page

Getting Along Together
Lloyd Morey 1

Excerpts From A Diary Of The Steps In The Development Of A Personnel Program For A Small School
Badgett Dillard 11

The Performance Of The College Retirement Equities Fund — A Case Of A Variable Annuity
Robert M. Soldofsky 15

Orientation — The Group Approach
Lu Ann Darling 20

The Stenographic Pool — One University's Approach To Successful Staffing
Louise Martin 26

Cupa's Book Shelf..... 30

Notes & Quotes..... ii

Editorially Speaking
William D. Poore iv

"boss". He views his supervisors as fellow professional workers, and they regard him in the same way.

Does not work by the hour. He does not adhere strictly to a minimum time schedule. He adjusts his working hours to meet the necessities and responsibilities of his duties, without thought to "overtime" or "standard work week".

Does not expect to be paid by the hour. He expects the over-all sum for which he has agreed to perform his duties. This sum is based upon the responsibilities involved and the professional service rendered. It cannot be measured in hours.

Takes full responsibility for the results of his efforts and his actions. He makes his own decisions and acts upon them. He may seek advice and counsel, but he does not attempt to transfer responsibility for his mistakes to others.

Continually seeks self-improvement. He takes advantage of all opportunities to improve his knowledge and understanding in connection with his professional duties.

Contributes to the skill and knowledge of the profession. He develops new ideas, plans and materials, and is glad to share them with fellow workers.

Respects the confidence of others. The welfare of those he serves often requires that information concerning them remain confidential. He is always careful never to violate this confidence.

Is loyal to his fellow worker. He never gossips about him nor about those he serves.

Avoids rumor and hearsay. He does not credit or repeat information received through a "grapevine". He secures information which is important to him directly from those authorized to release it.

Adjusts his grievances through the proper channels. He discusses them directly and privately with those authorized to make adjustment. He refrains from complaining and grumbling to others.

Meets his professional obligations. He fulfills completely all agreements and obligations entered into with fellow workers, whether they are legal or moral obligations.

Is sensitive to the problems of his fellow workers. He always considers the effect of his actions on the welfare of his fellow workers.

Does not advance himself at the expense of others. He strives for promotion and advancement in the profession only on the basis of superior preparation and worthy professional performance.

Is proud of his profession. He always reflects to those outside the profession a pride and a satisfaction in the work in which he is engaged.

(His) chief desire is to render a service. To improve men's welfare is the end toward which the professional worker devotes his career.

— Gerald B. Leighbody
Deputy Superintendent
of Schools,
Buffalo, New York

Editorially Speaking...

WILLIAM D. POORE

"We might as well require a man to wear still the coat which fitted him when a boy as civilized society to remain ever under the regimen of their barbarous ancestors." — Thomas Jefferson

"I am not an advocate for frequent changes in laws and constitutions. But laws and institutions must go hand in hand with the progress of the human mind as that becomes more developed, more enlightened, as new discoveries are made, new truths discovered and manners and opinions change; with the change of circumstances, institutions must advance also to keep pace with the times." These are the words of Thomas Jefferson.

Since the end of World War II we have witnessed considerable growth in the field of personnel management within colleges and universities. For several years colleges and universities have taught courses emphasizing the importance of the personnel function in modern business and industry, but, until recent years, have made only very feeble attempts to "practice what they preach". This growth has been prompted by: (1) an increase in enrollment in higher education and the resultant increase in the size of our college staffs; (2) the growth of the labor movement and its influence upon the college; (3) the recognition that personnel management requires special understanding and skill in solving today's "personnel problems"; and (4) the need to prepare for more effective management of our human resources.

Since the development of the atomic bomb, considerable attention has been given to the development of the physical sciences. Increased attention is also being given to research in the social sciences. Cecil E. Goode has suggested that, "perhaps our greatest need for the future is to balance the magnitude of our inquiry into human behavior, particularly in working organizations, with the great effort that we are making in the field of science and technology."

Although personnel management, as an applied science, is still very young, it has rapidly moved into a position, comparable in many ways, to other "professions". In a free society, such as we find in America, the responsibilities placed upon those of us working in the field of personnel is inescapable. Our whole way of life is predicated on the assumption that man, as a free person, able to choose and make his own decisions, is a happier and more productive individual than would otherwise be possible. Today, whether we recognize it or not, we are in a struggle with a way of life very much opposed to our concept of freedom. Every

organization needs a personnel program that will maximize the utilization and growth of employees.

We can help prepare for solving the problems of tomorrow by organizing and conducting worthwhile personnel research activities. This Association recognized early the importance of personnel research and has endeavored to encourage college and university personnel representatives "to conduct research for the improvement of personnel practices and to disseminate to the administration and staff of educational institutions information regarding sound management practices".

It would seem that those of us working in a college personnel office have additional opportunities and responsibilities to encourage and to participate in, where possible, research projects. If personnel management is to improve as it should and be prepared to solve more effectively the coming problems, constant research is essential.

Personnel research can serve at least three useful purposes. *First,* it can supply additional knowledge and techniques to replace those activities that have been based upon common sense or experience. Much of the information required to reach this objective is made available through research taking place in other fields, such as pyschology, sociology, and education. We, as personnel officers, must endeavor to stay abreast research developments in these areas in order that our knowledge may increase and our techniques improve as additional insight is achieved.

Second, through personnel research, it is possible for us to devote attention to new problems which arise as a result of the dynamic social setting in which we find ourselves. Many changes are taking place today, and personnel research becomes more important in helping us plan for tomorrow's needs. By 1965, for example, Government analysts indicate that the nation will need six million more workers to produce the goods and services demanded by the expanding population. The changes brought about by automation and the increasing number of senior citizens will demand many changes in employment and retirement programs.

Third, personnel research serves as a stimulus to improvement. This is perhaps one of the major reasons for encouraging individual research. Too often we become so involved in performing the techniques of our work that we lose sight of the prime objective.

The Research Committee of our Association has sponsored research projects during the past several years; however, much more good work is needed and can be done. So often we have expressed an interest in, and a need for, personnel research, but have failed to do much about it because of monetary limitations, or because of the demands it would make upon our time. While there is often justification for such reasons, too frequently they represent a feeling that research is "frosting on the cake" and not an essential part of the operation. Today, more than ever before, financial assistance can be secured for worthwhile personnel research activities.

Paul Hartley suggested in the last issue of *The Journal* that we provide useful experience for the young man or woman on

(Continued on Page 10)

Getting Along Together

LLOYD MOREY

"Togetherliness is the backbone of management. . . . Colleges and universities constitute a great area for the practice of togetherliness — of getting along together. Their wide and expansive variety of personnel and activities presents almost every kind of human relationship and organization problem."

Much time is devoted to the discussion of organization and techniques of business management. An even more important question is how these mechanisms can be made to really work to produce the best results. No matter how good systems and procedures look on flow schedules, or how orderly and logical the organization charts appear, it is the end effect that really counts.

There is probably no subject more talked of in this age than *machines*. One of the marvels of progress and ingenuity in our country is the way in which mechanical devices have been developed and applied to the whole gamut of industry, farming, construction, office, household, and even educational operations. From the fertile minds of persistent researchers, the genius of inventors, the skill and venture of manufacturers and financiers, has come a great stream of machines to do thousands of labor tasks with speed and a minimum of human effort.

Unfortunately, much of this effort and outlay are currently devoted to instruments of human destruction. Nevertheless, benefits accrue in every walk of life, including the business office. Gone are the high desk, the high stool, the green-shaded goose-neck lamps, the cumbersome journals and ledgers, the copy presses, with which many of us of former generations began work. Instead, there are machines and systems which reduce to minutes the processes that used to consume hours and days of laborious routine. We owe a profound debt of gratitude to all those who have contributed to these advances.

In spite of their value and significance, machines are not the most important subject. Machines require human beings to design them and determine *how* they can be operated. Mr. Christopher Strachey, an English designer of computing machines, on a recent visit to this country, said that, "machines are stupid and dull. They will only do what a human being tells them to do." "Are they good or bad?" he was asked. "They're not good *or* bad," he replied; "they're inevitable." Edward R. Murrow, in his last person-to-person TV broadcast of this season, paid tribute to the scores of

From a speech before the Seventh Annual College Business Management Institute, University of Kentucky, July, 1959 by Dr. Lloyd Morey, President and Professor of Accountancy Emeritus, and former Comptroller, University of Illinois.

people of wide range of skills and responsibilities who had served him in setting up his show. "A thing like this was possible," he said, "only because it was carried out by people who know their job and care for it."

Machines not only require human beings to design them, but also to *operate* them. Hence, the most important subject to all our life and activities is not machines, but *people*. And the most important subject about people is not education, nor skill, nor pay, important as are all of these, but *whether they can work together*. Ask any successful executive what is the most important element in success; he will answer — the ability to get along with people. Ask any personnel administrator what is the most important personal quality looked for in a prospective employee of any level; he will answer — the ability to *get along* with fellow workers or associates and with people generally. It follows that our success as business employees or officers is not one whit better than our success in dealing with others.

Togetherliness

The Methodist Church not long ago started a new magazine to which it has given the title, "Together". It is a fine and simple way to express the greatest need of the human race. The subject of this paper might well be "Togetherliness". It is the basic virtue and the deepest need of human relations, including management.

Togetherliness starts in the home and extends into every walk of life and every gamut of society: school, church, business, professions, recreation, community, national and international relationships. It is a two-way operation: inward, between associates, between officers and supervisors on the one hand and subordinate staff on the other; outward, toward customers, the public and, as in the case of educational institutions, a wide variety of persons and groups. It is also two-way in another sense: downward, from executives and supervisors to employees and staffs; upward, from staffs and employees to supervisors and executives, from executives to governing boards, and from the latter to stockholders, public, alumni, donors, as the case may be. No person, whatever his level of responsibility, escapes these relationships in some form, many of them being varied and extensive.

Togetherliness is the backbone of management. It expresses itself in two ways: leadership or supervision and service. And the two are inseparable and interdependent. Together they involve the management of personnel and the responsibility of that personnel for performance. Only as the two function harmoniously and efficiently is success achieved for either the organization or the individual.

Colleges and universities constitute a great area for the practice of togetherliness — of getting along together. Their wide and expansive variety of personnel and activities presents almost every kind of human relationship and organizational problem. The business division of an institution of higher education is at the centre of this entire operation. Everything that is done in some manner and at some time touches it and requires service from it. An educational policy requires money to implement it. "Without proper

financial support," says Dean L. S. Woodburne in *Principles of College and University Administration*,[1] "an educational program will be pale and anemic." In his organization plan, he places the chief financial officer alongside the chief academic officer immediately under the president. Harry L. Wells, in his fine book, *Higher Education Is Serious Business*,[2] says: "The business management, by its very nature, touches everything that takes place within the institution."

Business Office

While the business operations are not an end in themselves, they include many essential mechanisms and services needed to help administrators and faculty get the real work of the institution accomplished. They also provide the facilities and many of the procedures necessary to enable students to get the education they are seeking. They must also keep the affairs of the institution in good legal and procedural channels, prevent obligating and spending beyond the ability of the institution to pay, protect the integrity of its funds, maintain records that are beyond challenge, and present essential financial facts convincingly.

After many years at the head of the business organization of a large university, I spent my final years in the president's office, thus having an opportunity to view the business operations from "the other side of the hall". My conclusion was that the business office is just as important as I had previously thought it was; a unit of highest significance and usefulness in the over-all functioning and successful operation of the institution.

The business organization, in its large sense of covering all the financial, business, operating and general service functions of a university or college, is a complex mechanism with a wide variety of personnel and levels of responsibility. No organization functions better than the level of performance of its personnel, not merely its executives or supervisors, but its clerks and workmen. Performance depends not alone on skill in the particular job, but at least equally on the extent to which employees are able to work together and, also, harmoniously with those in other departments and with the general public whom they touch. Service and understanding are needed for the latter.

There are basic principles of working together that are just as applicable in a college or university as in a business concern; just as applicable in one level or area of employment or responsibility as another. The emphasis may be somewhat different when dealing with an academic position as with a business or operating job, but the principles are much the same. Probably every executive or personnel officer would say that his greatest problem in recruitment is not so much an adequate supply of personnel, although that at present is frequently a major difficulty, but, even more, getting the right person for a particular place. Criteria naturally vary for different kinds of posts and responsibilities, but the general problem is the same in all.

Courtesy

We hear a great deal about the responsibilities of an employer to

1. Stanford University Press, 1958.
2. Harper and Brothers, 1953.

an employee, of a university to its nonacademic staff and to its faculty. We hear less about the obligations of an employee at all levels and areas to his employer; yet these are just as vital and important as the former.

Clifford A. Randall, president of Rotary International, told Rotarians at the 50th annual convention: "Let us not lose the earth in our headlong rush to conquer the sky. Don't worry too much about what takes place in the heart of an atom. Rather worry about what takes place in the heart of man. There is a tendency to cry out about one's rights without a corresponding desire or willingness to consider one's responsibilities. In the area of human relations, the objective of improved conditions between employer and employee is a part of the great objective of living together harmoniously."

What does an employer have a right to expect from an employee? Here are some of the principal things:

1. *Basic knowledge* and perhaps experience essential to handle the job satisfactorily (something that can be pre-determined with reasonable accuracy);

2. *Willingness to work,* not merely just enough, but hard and at all times;

3. Willingness to learn, to take suggestions, to grow, to make every effort to develop; this means — for every level of maturity — to *always keep studying;* it means increasing productivity and ability to take increased responsibility;

4. *Loyalty* — willingness to put the institution or other employer first in time and effort;

5. *Respect* for superiors, for associates, for rules;

6. *Integrity:* absolute honesty in all matters of responsibility; (A cashier in a large Chicago university one recent week end took some $13,000 of funds to the races, hoping to enlarge it before Monday morning. But it was a "point of no return" for him and his institution.)

7. *Courtesy:* toward superiors, associates and outsiders; and

8. finally, *Good conduct and character;* attention to one's spiritual well-being, as well as his social behavior.

Each of these desirable "virtues" is worth a sermon. If one were to pick out that which is more than average significant, especially as of now, it would be the quality of *courtesy.* This is the heart, the "spark plug," of "getting along together". Perhaps a better term would be *consideration.* Speaking simply, it means being *nice to others.* It means friendliness, good manners, respect for the opinions of others, interest in their problems, willingness to help resolve them, appreciation of what others do for us.

Nowhere is this more important than in the business offices of an educational institution. An individual, to do his best work, must be able and willing to work pleasantly and agreeably with his fellow employees and supervisors. Unless he can do this, his usefulness and productivity are greatly impaired, as well as his rating on one of the fundamentals for advancement.

But consideration is not confined to the office or shop or other internal operations. It extends to every one with whom any individual comes in contact. Few, if any, employees in the business division escape contact at some time with students, faculty, other administrators, and the general public. In every one of these contacts, the

individual is, for the moment, the organization of which he is a part. The impression he makes is an impression of the activity he serves. If he is friendly and courteous, if he endeavors to serve pleasantly and efficiently, the reputation of his organization is enhanced; if not, it is damaged.

The State of Illinois has set up a separate merit or "Civil Service" for the nonacademic employees of its several universities and scientific bureaus administered by them. One of its recent publications is devoted to "Our Public Relations Code".[3] It says among other things: "We believe that the Civil Service employees of the universities are an integral force in furthering the primary functions of teaching, research, and public service. . . . We believe that Civil Service employees owe a day's work for a day's pay, performed with an attitude of helpfulness and courtesy. We believe that public relations is everybody's business." P. R. may stand for Public Relations, but it stands also for Personal Responsibility.

There is no human quality in which a rebirth is more greatly needed than courtesy or consideration. On streets and highways, the lack of consideration for others by drivers of automobiles is so prevalent that it leads to frequent unpleasantness, flares of temper, and even accidents. In offices and stores, one meets continually the spirit that an employee is conferring a favor on a customer by waiting on him.

A writer, in a recent issue of *Family Weekly*[4] describes his experience in Hawaii, comparing it to "back home": "I remember how Jean used to come home fuming from the supermarket in Buffalo. 'I've never seen such inconsiderate clerks,' she'd say. 'Half the time, when you ask for something, they just stand there talking to one another.' One day I realized I'd never heard her make the same complaint in Hawaii. So I asked her why. 'Now that you mention it,' she said, 'I guess I haven't run into a discourteous clerk here. They seem to like to help you all they can.'"

Everyone needs to learn the importance of being pleasant. It is not so much *what* is said as *how* it is said. "It isn't a question of whether you should argue; it's the way you do it that is important," says Professor Harold P. Zelko of Pennsylvania State University.[4] "People are bound to have different points of view. We get the best laws, the best production methods, the best company policies as the result of putting together a great many different ideas. A healthy airing of diverse opinions is one of the best ways to tackle a problem. You can do this and still maintain good relations with people.

Arguments are not won, they are avoided. You have a right to maintain your point of view in any discussion. But it is the way you do it that counts!"

Fundamental Qualities

The development of the desirable fundamental qualities in employees which we have briefly described is, to a considerable extent, the responsibility and challenge of supervisors and executives. Furthermore, the qualities themselves are such as should be cultivated by every individual for himself.

In addition, for all who now have, or may at some future time

3. **Campus Pathways**, December, 1958, Urbana, Illinois.

4. **Family Weekly**, June 14, 1959.

have, responsibility for any phase of the business operations of higher education, I have a few suggestions of things which I believe will help in such relations (as a matter of fact, I found them good for a president, as well):

1. School yourself to think and work cooperatively; most things can only be accomplished with the help of others; their cooperation is needed, and to get it, you must act in the same spirit;

2. Use persuasiveness rather than the force of authority to the fullest extent possible; in an educational institution, people do not like to be ordered to do things; they expect reasons for what they are required to do; it is better to get them to feel they have entered into the reasoning back of decisions, and concur in advance in the conclusions;

3. Be open-minded and willing to consider the opinions of others; listen first, decide afterward; give ample time to consideration of each problem and for discussion with others;

4. Be honest, fair, consistent and prompt in your dealings and decisions;

5. Be patient; give time for the creation of the right atmosphere for changes;

6. Delegate responsibility as fully, wisely, and freely as possible, but give authority with it; then hold your delegates responsible for results and for errors, as well;

7. Do not insulate yourself either from your own staff, or from the members of other departments; or from your public; be friendly to all, both academic and nonacademic persons. Queen Elizabeth, recent honored visitor to our country, says she makes it her rule to "take every opportunity to chat with oridnary people"; make everyone feel you consider him important, whatever the level or character of his work; lastly, avoid developing or holding grudges, even when you are certain the other party is wrong and is treating you unjustly.

One of the best concise statements I have seen of the principles of university business administration is in the excellent book, *The University and Its Publics*, by Clarence A. Schoenfield, of the University of Wisconsin.[5]

"The well-oriented business officer realizes that his department exists as a service to the institution and not as an end in itself. He is able to meet and promote satisfactory relationships with a wide variety of persons, many of whom are allergic to 'red tape', and to handle or direct the handling of myriad details himself. Above all, he should be competent and willing to show an intelligent interest in all the work of the institution."

It is the function and duty of the chief business officer to lead his organization toward these goals. To the extent that he is able to do so, he will more fully fulfill what his board, his president, and his fellow administrators and the faculty have every right to expect of him and his division, an instrument of service and not an unnecessary obstruction.

Complex Business Operation

There is no longer any doubt as to the importance and high significance of the chief business officer in higher education, even in the minds of most of the faculty. As President McVey has said: "The university financial officer . . . once a bookkeeper, now sits at the head table . . . his importance in educa-

5. Harper and Brothers, 1954.

tional administration has grown tremendously; he can and does enter into policy making." President Hughes added: "The office is very important and calls for a superior man."[6]

Most larger institutions, and many smaller ones, have made their chief business officer a vice president. In 1930, in my *University and College Accounting*,[7] I predicted this as a probable trend. It has been largely realized, and appropriately. Not only has the dignity of the office been recognized, but in large proportion incumbents are measuring up to the responsibilities thus placed upon them. A new profession has been born and is slowly maturing, one which importantly serves educational objectives and progress.

The primary responsibility and the major burden for operations of a college or university are on the president. Dr. Charles F. Thwing, distinguished educator and longtime college president, in his book, *The College President*,[8] said: "The business of being a college president is the most dangerous of all professional business."

We speak of a college or university as an *educational* institution. That is, of course, its fundamental objective. But in a broader sense it is much more; it is a public service enterprise; it is a complex business operation. It must serve and maintain the good will not only of its *students, parents* and *alumni,* but also of the *general public,* federal agencies, other educational bodies, the *industries* and *professions* for which it trains personnel and which it increasingly serves in research programs. A state institution must serve the *state* administration and *legislature.* It is not too much to say that no present-day organization has a broader or more complex scope of relationships than a large university.

Such an institution needs for its leadership more than educators in the usual sense of that term. To function effectively, it must have not merely scholars but experts in the various fields of administration. Important as is an understanding of educational objectives and procedures, even more important is the ability to oversee a great and complex business enterprise, and to present its facts and needs intelligently and convincingly. A university must have competent educators for its teaching and research activities; administrators must be wise enough to listen to them, but must understand administration and public relations as well as education.

A college president's risks and burdens are lessened if he has capable lieutenants. None of these is more important than his chief business officer. "Financial control is fundamental," said Dr. Thwing, "not as a final cause, but as a formative force or condition. It belongs to the financier, not to the scholar." The only two presidents I have ever known of who insisted on keeping financial matters in their own hands landed in jail as a result.

Relations With The President

The chief business officer should be, and customarily is, administratively responsible to the president, although he usually has more or less direct contact with, and sometimes some direct responsibility to, the governing board. These relationships, by necessity,

6. Iowa State College Press, 1952.
7. John Wiley and Sons, New York.
8. Macmillan, New York, 1926.

are exceptionally intimate. They also involve for both parties — but especially for the business officer since he is the subordinate and in most respects must, in the last analysis, yield to the president's decisions — a high degree of tact, diplomacy, and restraint, coupled with the requisite amount of firmness and, of course, courtesy.

What are some of the special opportunities of the business officer to serve the president? Here are some illustrations.

1. Many of the problems presented to the president also come to the business officer because nearly every problem has its financial aspect; unless that aspect can be satisfied, the proposal stops or must wait, whatever its merit otherwise. It is important for the business officer to show a sympathetic and helpful attitude toward every proposal, and more often than not his help is needed and is important to the president.

2. The president does not want from his business office frequent voluminous reports or a mass of financial detail. He does not have time to read them and should not have to concern himself about most of them. The top question that he wants a ready answer to is: How much free balance is in general current funds out of which he can make assignments or recommend such to the Board? Details of departmental situations he wants to leave to the department and the business office.

This does not mean complete reporting at the proper time and place is undesirable or unimportant. It is a fundamental of good practice and of good public relations. Even for the public, however, condensed, pinpointed reports, attractively illustrated, are better than lengthy accounting schedules. By all means have the latter, but keep them in reserve and use them sparingly.

3. The president expects the business officer and every other executive to solve their own problems in every instance possible; and if they must be brought to him, to give him a recommendation for a solution. In other words, he wants not merely reports of difficulties or plans, but he wants to know chiefly what he can and must do if necessary to resolve those difficulties or make the plans work.

In all phases of state and federal relations the business officer should be in the forefront of activity and participation. This is especially important when a state administration attempts to "move in" on the internal financial management of a college or university. (For a complete review of this subject on a nationwide basis, see the reports of the Committee on Government and Higher Education.)[9] There are also general areas in which the business officer may well develop an expert judgment. Among these are finance, inflation, and federal aid to education.

In these and other ways the business officer can guide the president and the board in reaching the right decisions on matters in which finance and business management are involved — and that means most everything that is considered.

In certain problems and questions, the word of the business officer should be final, and he should stand firm on his premises. Among these are:

1. Determining resources, and their availability to meet proposed obligations;

2. Seeing that obligations do not

9. Johns Hopkins University Press, Baltimore, Maryland, 1959.

exceed the ability of the institution to meet them;

3. Provision for, and segregation of, funds necessary to meet obligations;

4. Maintaining integrity of funds;

5. Institutional, state, and federal rules and laws which apply;

6. The place and manner in which all financial records are to be kept;

7. Safety and related matters of plant operation and maintenance;

8. Above all, the judgment as to the best and most economical way of providing the facilities and materials to meet the educational requirements indicated by academic personnel as necessary and for which funds are authorized.

In all of these, the important thing is to *know your facts*, then stick to them. In other matters, the business officer should be a party in counsels and consideration of all those projects where finance may be involved; but beyond purely financial considerations, he should be neutral and flexible, and not attempt to influence educational policies or decisions. If the president seeks his personal advice, he should stand ready at all times to respond; may often render good and unbiased judgment on almost any problem.

As a quick summary of the relation of the president to business matters, I refer to my article "What the President Should Know about Business Management."[10] (It might well be required reading for all, especially those who have had little or no experience or contact with the business management side of education.)

Experience including headship of an institutional business office is good preparation for the presidency. The same fundamentals of management apply in both offices; there may be a difference in emphasis and breadth, but not in principle. If an individual possesses executive ability and other essential qualities, and an adequate educational background, he may easily be well fitted for such a post. Boards and committees faced with the problem of finding a president might well give such persons a higher rating than often is the case. The possession of a doctor's degree earned in course is an advantage, but this is not a necessary prerequisite for success, nor will it guarantee that to anyone.

Growing Professionally

Neither the business officer, nor, his responsible associates, should confine their activities and interest to their own campus. Opportunities now exist through regional business officers' associations and through organizations of the various business management specialties, for contact with similar officers of other institutions in the mutual exchange of experience and information and the discussion of problems. This is the application of the principle of "working together" on a wider scale.

If a business officer has a professional field, such as accounting, engineering, management, or if he is in an academic field, he should maintain his connection with this area also, and participate, to the extent possible, in such professional activities. Being a college business officer should not shut out one from the professional field of his training.

It is an excellent thing for persons in business positions to be

10. The Educational Record, October, 1958.

members of, and to carry limited responsibility in, some teaching faculty. This is advantageous to the academic department concerned and to the individual.

Business officers need to be more vocal in speaking up in defense of the principles and practices of their profession developed by years of competent study and usage. Occasionally these are unintelligently attacked by persons of inadequate understanding who do not take the time to inform themselves properly. While no one should have a closed mind on possible improvements, he should have the courage to speak out his convictions where his knowledge and experience are superior.

Working Together

Working together is by all tests the greatest problem of the entire human race. It is found in every individual and group relationship, including those between nations. To solve it at a person-to-person level is to lay the foundation for its application at the international level. Peace among nations must begin in the hearts of men. Only when the people of all nations *think* peace will nations, themselves, cease their strife and begin to work harmoniously and unselfishly with one another. Then will our goal of "Getting Along Together" become a great and universal reality.

Editorially Speaking . . .

(Continued from Page v)

our campus, who has potential for personnel work. In addition, we should indicate our interest in participating in the educational program of the institution we serve by encouraging students — particularly graduate students — to do personnel research through our offices. We are certainly in a unique position to make a contribution to personnel research through this method. Such a program should enhance the value of the educational program, and, at the same time, lead to the development of new information for the guidance of others.

Another item which I would like to emphasize is the importance of sharing information, received from various research projects conducted by us, or others, on our campuses, with others engaged in similar work. "The Newsletter" and *The Journal* both exist to give members of the Association the opportunity to exchange views and to report upon projects that would be of mutual interest.

The next 10-15 years offer a tremendous challenge to those of us engaged in personnel administration. We are reading and hearing much about the "profession" of personnel management. I believe the following statement by Dr. John M. Pfiffner, Professor of Public Administration at the University of Southern California, should help us place the matter of personnel research in proper focus. "Every calling or vocation which aspires to become a profession must be based upon a scholarly under-pinning. The more mature and sophisticated any professional group becomes, the greater emphasis it will place upon research and validation of its procedures through the scientific method."[1]

I urge each of you to suggest research activities for consideration by the Research Committee.

1. John M. Pfiffner, "The Personnel Function in Government," Public Personnel Review, October, 1956, page 187.

Excerpts From A Diary Of The Steps In The Development Of A Personnel Program For A Small School

BADGETT DILLARD

In this article is recorded a week-by-week development of a personnel program for clerical and manual employees of The Southern Baptist Theological Seminary, which has 1,157 students and 180 employees in the clerical-manual group.

April 8, 1957

Today I sent to Dr. McCall (president of the school) a memorandum giving my reactions to the proposals of the management consultants regarding the need for a well-defined personnel program for clerical and manual employees. The consultants are entirely correct in finding that there is now no clearly defined program, existent policies are inadequate, hiring practices are not uniform, salaries and wages are not related to job content, and conditions of employment are not made clear to the workers. Most of these things we knew, but we have not known what to do about them. Now that the problems have been forcefully brought to our attention, perhaps we can proceed to find the proper solution.

May 15, 1957

The management consulting firm has agreed to assist us in the installation of a personnel program for clerical and manual employees. They have suggested wisely that it would be better for us to develop the program with their counsel along the way, rather than for us to employ them to prepare a "package program" which we would then have to operate. It has been agreed that Mr. Wolfe (a member of the firm) will spend a total of sixteen days with me over a six-month period, giving guidance as needed. We are to begin on July 8.

Mr. Dillard is Manager of Administrative Services and Personnel for the Southern Baptist Theological Seminary, Louisville, Kentucky.

July 12, 1957

Never have I spent a busier week! Mr. Wolfe and I have devoted the last five days to working out the timetable for the development of the Seminary's clerical-manual personnel administration program, right through to its completion, which is planned for February 1, 1958. Yes, this has been a busy week, but it appears to be only a sample of what I am in for during the next several months. My work is laid out for me.

July 15, 1957

President McCall met today with

all department heads having responsibility for either clerical or manual employees and told them of the plans for a more adequate program. His announcement was well received, for we have all long recognized the inadequacy of present practices. After Dr. McCall finished, I distributed to the department heads preliminary job description questionnaires to be filled out by each employee and to be returned to me by July 29. Through the questionnaires we expect to learn as much as possible about each job — machinery used, special knowledges or skills involved, supervision given to others, important decisions made, unusual factors, etc. Each questionnaire includes a page of instructions to assist the employee in filling it out properly.

August 9, 1957

Mr. Wolfe was with me again this week, and together we grouped the nearly 200 completed job questionnaires by class of work and similarity of duties, and came out with some 60 different positions, for which we wrote preliminary position descriptions. For example, the position description for office clerk includes the principal function of an office clerk, along with a list of regular duties, and a list of other duties which may be performed occasionally by a person filling that position. The description fits workers in several offices. Among the 60 positions established are such others as secretary, clerk-typist, janitor, cleaner, cook, library clerk. Next week I plan to go over these preliminary position descriptions with all department heads to be sure that the descriptions, as we have written them, apply accurately to the work in their departments.

August 12, 1957

If our personnel program is to be effective, the salary and wage part of it must bear some relation to the community wage scale. For that reason, I expect to spend much of this week contacting major employers in Louisville and checking with them on the wage rates for certain positions they have which are essentially equivalent to ours.

August 16, 1957

The community wage survey was especially rewarding. In it I interviewed personnel men from the university, another seminary, the telephone company, and a large wholesale house. In addition, I had access to a 1957 wage survey for the entire community, conducted by the Southern Bell Telephone and Telegraph Company. With this information, I am now in a position to observe the variances between our present wage structure and that of the community, and to see how much adjustment needs to be made to bring ours into line.

August 20, 1957

Much time is being spent right now refining work factors by which the 60 positions at the Seminary will be evaluated. I have taken a fairly standard list of job evaluation factors, and am making whatever adjustments are necessary in order to make them applicable to our positions. These factors include: extent of equipment and procedure knowledge, accuracy and independent action required, extent and frequency of cooperation with others, physical

and mental effort required, and working conditions of the job.

August 24, 1957

All the department heads have now finished reviewing the preliminary position descriptions. In most cases the descriptions are adequate as written, but in some, minor adjustments will have to be made. This consultation with department heads is quite valuable, for it is extremely important that all the persons involved realize that they have a vital part in the total program, and their suggestions are to be welcomed and given serious consideration.

September 11, 1957

President McCall has just appointed the Job Evaluation Committee to work with me in evaluating the Seminary positions. I have been named chairman of the committee. Other members include a representative of the academic supervisory staff and a representative of the nonacademic staff. In addition, each department head will serve temporarily on the committee when it is evaluating positions in a given department. I am pleased with the committee, and feel that it will do a thorough job.

October 7, 1957

The Job Evaluation Committee today completed three weeks of hard work. We met daily for two hours, evaluating carefully each of the positions established and arriving at a point value for each of them on the basis of the work factors involved. The entire program looks so logical now, as everything seems to fall right into place. Position point values range all the way from 45 to 290 out of a possible maximum of 300 points. Now if we can just arrive at the minimum wage to be paid, and at the slope of the wage curve, we will be ready to move ahead. The minimum obviously should be as close to the community level as possible, and the curve should be the same slope as the community, if not identical with it.

October 9, 1957

I have developed three wage proposals for presentation to the president. The first is at the community level, and appears so beyond the present budget for clerical and manual wages that I cannot recommend its approval at the present time. The other two are at various lower levels of a more realistic nature.

October 10, 1957

The president approved one of the two lower wage proposals, and also the steps outlined for the implementation of the program. Unlike the old system, where employees were paid whatever the supervisor wished to pay them, the new program calls for wages specially set in relation to the evaluation of the work factors in each position. Also, opportunities are provided for wage increases — automatically at the end of a three-month probationary period, and then two additional annual merit increases based on the recommendation of the supervisor. The program now goes to the Financial Board of the Trustees for final approval.

October 15, 1957

The Financial Board wanted

"the works". I told them as fully as possible the complete story of the development of the program being presented to them, and then answered numerous questions about the various facets of the program, primarily relating to present and anticipated costs. They were completely sympathetic, and appeared delighted that something concrete was being done to put personnel on a better basis. Approval was unanimous.

November 12, 1957

Today the first major step toward the implementation of the personnel program was taken. All clerical and manual employment was transferred to me, so that I would have ample opportunity to work with the authorizations and to set up the structure for beginning the wage changes, which have been set for February 1, 1958, the half-way point in our fiscal year.

February 2, 1958

We're off! Yesterday the final steps were taken to implement the new personnel program. Wage adjustments were made; procedures worked out carefully in previous months were inaugurated; records were put into operation. Six months ago it seemed an impossible task, but at last we're over the hump. No, not the end, but the beginning, for the new program will mean constant work lest it become as antiquated as the previous one. Specifically, the new set-up centralizes the following operations:

1. Authorization of all expenditures of clerical and manual payroll funds.
2. Employment of personnel, determining wage rates, and approving merit increases.
3. Defining vacation, sick leave, and other employee benefits.
4. Interviewing, testing, hiring, and termination practices.

November 26, 1959

What a wonderful thing to be thankful for on this Thanksgiving Day! — a carefully worked out, well defined personnel program at my school, which is designed to attract, motivate, and retain the best possible employees, and to utilize effectively their abilities in such a way as to build an effective team capable of working together harmoniously in full accord with the purposes of the school.

The Performance Of The College Retirement Equities Fund — A Case Of A Variable Annuity

ROBERT M. SOLDOFSKY

The author has a professional, as well as a "hobby" interest in the subject of this report of growth and performance of CREF from July 1, 1952 to July 1, 1959. Personnel people working in colleges and universities will find it interesting, as it gets to the root of retirement programs.

The research for this report was orginally undertaken because I was interested in learning the rate of return that was being earned by my investment in CREF. A number of my colleagues were also interested in the answer to this question. It is well known that, primarily by means of comparing rates of return on various investments, an individual can obtain some idea of his relative degree of success. In October, 1959, the substance of my findings were printed in *Staff Magazine*, published by the State University of Iowa. These findings have been brought up-to-date and expanded somewhat. I believe that the business and personnel officers of educational institutions who have some responsibilities for the selection of the pension plans, and who regularly discuss pension plans and retirement programs with other members of their respective staffs, will find the information in this report of considerable interest.

This review will consider briefly the history and growth of CREF, its performance during the accumulation period, that is the period during which the individual builds up the fund out of which his annuity will be eventually paid, and its performance during the retirement period.

CREF is one part of an integrated program for providing retirement income for employees of educational institutions. The other part, Teachers Insurance and Annuity Association (TIAA) was founded in 1918 by the Carnegie Foundation for the Advancement of Teaching and the Carnegie Corporation. Most of the more than 900 educational institutions that have TIAA retirement plans also make CREF available to their participants. A TIAA annuity policy holder may allocate ¼, ⅓, or ½ of his regular contribution (including his organization's contribution) to CREF. The growth of CREF's participants and net assets are shown in Table I. About 64 per cent of TIAA participants eligible for CREF have allocated a part of their income to CREF. About 500 persons are receiving CREF annuity payments.

Mr. Soldofsky is Associate Professor of General Business in the College of Business Administration, State University of Iowa.

Table I

Growth Of CREF

(Figures are as of end of calendar year, except premiums, which are for entire year)

Year	Participants	Net Assets
1952	7,302	$ 953,000
1953	14,875	5,543,000
1954	19,319	15,589,000
1955	25,097	27,737,000
1956	31,156	39,818,000
1957	38,798	49,449,000
1958	50,087	90,249,000

Source: Annual Reports, TIAA and CREF

Rate of Return During Accumulation Period

Two questions of great general concern, and of particular concern to all individuals who participate in CREF, are the rate of return CREF investments have earned and the rate they are likely to earn between now and the time of retirement. Monthly CREF premiums are used to purchase common stocks. An individual's investment in CREF is measured in terms of shares called *accumulation units* up to the time of retirement. The number of accumulation units purchased is determined by dividing the periodic premium (less the operating expense charge) by the current price of the accumulation unit.

The value of these accumulation units varies each month with the current market prices of the securities owned by CREF. An individual's investment in CREF accumulation units increases because of his monthly premiums and because of the dividends earned by his investment. The average annual dividends paid to CREF participants have ranged from 2.9 - 4.3 per cent. The low dividend rate of 2.9 per cent paid for 1958 is the result of the relatively high market prices of stock during most of that year. The total value of the fund also *rises and falls* with the change in the value of the accumulation unit itself. In computing the long run rate of return on CREF, both the rise and fall in the value of the accumulation unit itself and the dividends must be taken into account; for the TIAA fixed-dollar annuity the rate of return is the interest rate credited to the annuity.

The rate of return on TIAA has been about 3 per cent since 1952. A premium of $10.00 per month (less the expense charge of 4 per cent) would have grown to approximately $909 from July 1, 1952 to July 1, 1959, with the interest rate at 3 per cent. The investor's payments, less the expense charges, are $806, and the balance, $103, is the interest earned on the investment. A $10 monthly investment in CREF (less the expense charge of 4 per cent) grew to $1594 during the same period. The $788 gain above the investment itself is the result of the combination of the dividends earned and the rise in the market price of the stocks owned by CREF. The average rate of return on the CREF accumulation units, considering both dividends and appreciation, has been slightly above 15 per cent per year from the date it started, July 1, 1952, through June 30, 1959.

This average rate of return applies only to those individuals who have participated in CREF since July, 1952. For each starting date there would be a different rate of return. A further limitation is the fact that the 15 per cent rate is based upon the assumption of a constant periodic payment. Despite these limitations, the 15 per

cent rate of return is a reasonable approximation of the rate earned by those who have participated in CREF for several years. The uneven growth of the value of CREF reflects primarily the fluctuating value of the accumulation unit, and, secondarily, the changes in dividends received from the shares owned by CREF.

Average increased to 644 on June 30, 1959, from 274 on July 1, 1952. The dividend yield on this average has dropped from 5.9 to 3.0 per cent during the same period. Second, only about 7,300 of more than 50,000 CREF participants have owned CREF accumulation units since 1952 as shown in Table I. The rate of return achieved by

Table II

Value Of $10 Per Month Invested At Various Rates Of Return [a, b]

Years	0%[c]	3%	6%	10%	15%
5	$ 576	$ 630	$ 688	$ 774	$ 1,008
10	1,152	1,360	1,609	2,020	2,805
20	2,304	3,188	4,492	7,259	13,865
30	3,456	5,645	9,659	16,375	58,596

[a] After deducting a 4% expense charge from the annual payment.

[b] Interest (dividends) converted annually.

[c] This column gives the value of the investment itself after deducting the expense charges.

Table II shows the value of $10 per month invested at various rates of return with the "return" converted annually for 5, 10, 20, and 30 years. The zero rate of return represents the net premiums, themselves.

The individual's accumulation fund at the time of retirement will depend upon the number of years the individual participated in CREF, the monthly premium, and the rate of return. The number of years to retirement is fixed for most individuals, and the monthly premiums can be estimated. What rate of return can the individual look forward to from his CREF accumulation units?

The rate achieved by CREF to date probably overstates the long-run rate that can be expected for several reasons. First, on July 1, 1952, when the CREF was started, the stock market was relatively low as measured by the dividend yield on the Dow Jones Average of 30 Industrial Stocks. The D-J

individuals starting CREF at later dates is affected by the timing of their initial participation. Third, the stock market may drop sharply at some future date and thereby reduce the rate of return. Even a stablized stock market for several years, as measured by the value of the accumulation unit or the D-J Industrial Average, would have the effect of reducing the over-all rate of return.

On the other hand, the rate of return on CREF may stay approximately where it is or even rise a little. First, the individual paying a constant monthly premium into CREF buys less accumulation units when the market is high than when it is low. The result of dollar cost averaging is that the average purchase price of the shares held is less than the average price of stock generally. Second, the rate of return from the ownership of common stock is expected to be greater than the rate of return from bonds or other

fixed-dollar investments because of the greater degree of risk in common stock ownership. Third, if inflation continues at about the same rate it has in the past, the dividends and prices of common stock are likely to reflect the higher earnings per share from the higher investment per share of the corporations, themselves.

There are two bits of evidence indicating that a rate of return of 10 per cent per year, or better, from the ownership of well-selected, professionally managed, diversified common stock holdings is probable in the United States. First, according to a study made by American Institute for Economic Research, the rate of return on $1000 invested in a composite of all mutual funds for the period 1920-1952 was over 10 per cent. This rate of return includes both the appreciation on the original investment and reinvestment of dividends. Second, some calculations made by the writer indicate that an earnings yield of well over 10 per cent has been achieved by owners of well-diversified lists of common stock since World War II.

An important advantage of owning a variable annuity such as CREF, or a fixed-value annuity such as TIAA, is the tax shelter it provides during the accumulation period. There are no personal taxes paid on the interest or dividends earned. The funds that would have been paid out in taxes are used to enhance the growth of the retirement fund itself. The taxes on the total earnings prior to retirement are paid during the period the annuity payments are received. During these later years of an individual's life, his taxable income is likely to be lower, and he also receives special tax exemptions. Therefore, his income tax payments, if any, are likely to be very small.

However, individuals who start their participation in CREF when the stock market is relatively high cannot expect to earn a high rate of return over the space of the next few years. In fact, when the prices on the stock market drop, the value of their investment fund may drop below their premiums paid in. Over the long run, 10 years or more, it is not unreasonable to expect a rate of return from investment in CREF in the neighborhood of 10 per cent per year or more.

Performance During Retirement

At retirement the individual's accumulation units are converted at their then current market price into *annuity units*. A fixed number of annuity units is payable each month for life. The number of annuity units payable is computed on an actuarial basis. The annuity can be figured as a single life annuity, a last survivor annuity, or an annuity with a minimum guaranteed period. Under the retirement plan, a participant may elect to transfer all or a part of his CREF funds into a fixed-dollar TIAA annuity.

Table III
Annuity Unit Value

Annuity Year May through April	Annuity Unit Value
Initial Value	$10.00
1953-54	9.46
1954-55	10.74
1955-56	14.11
1956-57	18.51
1957-58	16.88
1958-59	16.71
1959-60	22.03

Source: **Annual Reports,** TIAA and CREF

The dollar value of an annuity unit fluctuates from year to year depending upon the market prices of the stocks owned and the dividends received by the Fund. Table III shows the value of the CREF annuity unit. This value is computed once each year for the next twelve monthly payments. The rate of growth in the value of the annuity unit has been well above 10 per cent per year. This is in sharp contrast to the rate of return achieved by fixed-dollar annuities.

Conclusion

The performance of the CREF accumulation unit and the CREF annuity unit have been outstanding since their beginning in July, 1952. Part of the excellent performance has been due to the rising prices of common stocks generally. Individuals who buy the accumulation units or annuity units under a variable annuity plan today or in the future may not have such a favorable short-run experience. In fact, the current value of their variable annuity may fall below their investment. Over the longer run, the rate of return on an ably managed, well-diversified variable annuity will probably be significantly higher than that of a fixed-dollar annuity.

Placing a portion of an individual's retirement funds in common stock is an excellent idea, even when there is no expectation of inflation, because of their higher rate of earnings. In the case of slowly rising price levels, such as has been experienced in the United States in the twentieth century, common stock ownership has been a good "hedge" against inflation. It appears likely that common stock will continue to be an adequate hedge against inflation *if the nature and rate of inflation does not change substantially.*

Orientation — The Group Approach

LU ANN DARLING

How valuable are orientation programs? This article presents a plan of one campus, which should be helpful to a personnel staff in the process of initiating, or evaluating the effectiveness of, such a program.

In June, 1959 the UCLA Teaching Hospital celebrated its fourth birthday. During this period of time, members of the Personnel Office staff have talked to nearly 1,600 new employees in 122 small group meetings and to 404 in 7 large group meetings. Those of us concerned with orientation of new employees are convinced that the *small group meeting* is one of the very best ways to help a new employee get a good start on a new job.

Goals Of Program

Our goal is to help the new employee develop a favorable attitude about the Medical Center and the University. We help him establish a feeling of "belonging" by providing a warm, friendly environment and by helping him see the importance of the work at the University and where he fits into the picture. We want to help each employee "identify" with the University and to become enthusiastic and proud of its accomplishments. We feel that this will lead to a more productive worker who is less likely to quit. We also want to prepare him for learning his new job by removing much of the fear, uncertainty, and ignorance about his job.

An orientation program begins with the employee's first contact with the organization, usually when he is interviewed for a job, and it may continue for several months in the new job. There are several ways information can be disseminated. The interviewer discusses job duties and general conditions surrounding employment. The superviser introduces the employee to the department and provides specialized training and information. Employee handbooks and hospital newspapers describe policies, benefits, and activities. The group meeting is needed to see how well all this information has been received by the employee and to show him how to make use of the publications available. It provides a very necessary feedback.

The group meeting is important because:

1. Every new employee has individual needs — fears, uncertainties, and misconceptions stemming from previous employments, personality, home background, etc. Printed material is ineffective in meeting many of these needs.

2. A new employee needs a "morale boost" to support him against possible disappointments and rebuffs of the new job. Small group meetings provide warmth, friendliness, and show interest in

Miss Darling is a Personnel Analyst at the UCLA Medical Center. This article has been adapted from a talk given by her at a recent meeting of the Association of Western Hospitals.

him as an individual; they can have an emotional impact.

3. Better coverage of questions through discussion means less interruption to supervisors later on the job, and avoids getting the wrong answer or a prejudiced viewpoint from a sour employee, who might become a source of information by default.

4. In the group meeting, the employee establishes a relationship with the Personnel Office staff.

How It Works

At the time that his hiring papers are processed, the employee is given printed material about the University, an Employee Handbook, and an invitation to attend the weekly orientation meeting, together with an invitation to tour the Medical Center immediately following the orientation session. A conference room is used for this meeting.

This group is a mixed one, consisting of all employees hired during the week. The setting is informal and relaxed; each employee introduces himself, giving his job assignment. The discussion leader, who knows the department and jobs, can draw out the employee and comment on the departmental program. The discussion leader outlines the scope of the meeting: to introduce the employee to the University of California, to discuss personnel policies, and to answer questions.

As a starter, the discussion leader develops, with the assistance of the group, a simplified organization chart of the University. The group develops the chart together, down to each employee's own department, and it is assumed that each supervisor carries it on from there.

In conjunction with development of the chart, we show colored slides of the various campuses of the University and of the activities on our own campus. The first slide is a map of the State of California showing the locations of the various University activities; we quickly visit each campus. Some of the activities are a surprise to employees, especially the Lick Observatory at Mt. Hamilton and the Scripps Institute of Oceanography at La Jolla. We use a slide of Los Alamos' Scientific Laboratory to illustrate the far-flung activities of the University.

Then we visit the UCLA campus, pointing out major landmarks and history, unusual occupations, and fringe benefits. We do this in the form of a visual tour of the campus, but it can be handled equally well in other ways. We include discussions of buildings planned and under construction for two reasons: one of the most significant features of our campus is the rapid growth in enrollment in the offing, caused by the war baby crop, the influx of population into the state, and the continued high birth rate. New construction means noise and inconvenience, and we feel that employees who understand fully the reasons for the changes will accept the changes more gracefully. (Employee reactions to the building program have ranged from eager anticipation to outright groans.) Our final slide is a model of the campus showing proposed buildings.

After the lights are on again, the discussion is completely open to the group. If the group is slow to respond, we can "prime the pump" by suggesting items of interest. The blackboard is a handy device to explain policies. We make sure that pay, sick leave, vacation,

and retirement policies are covered. At the conclusion of the meeting we introduce the volunteer tour leader, who takes interested employees on the one-and-one-half hour tour of the Medical Center.

Composition Of The Group

All new employees are invited to an orientation session their first week of employment, regardless of their job or department. We feel that the better cross-section we have, the more effective job we can do of introducing the employee to his surroundings. This may be the only contact a dietitian will have with an animal caretaker, a maid with a research chemist, a statistician with a laundry worker. The employees leave the meeting with a better appreciation of the many different people it takes to provide a functioning medical center. We feel that it is important for the employee to see himself as a member of the University staff, not just of Nursing Services or Housekeeping. It is possible to save a few minutes of meeting time by having all janitors or all nurses, but a certain amount of cross-stimulation is lost in doing so.

Size Of Group

We have experimented with large and small groups, and weekly and monthly meetings. For three and a half years we have had weekly meetings with groups of 4 to 25 employees, the average number being about 10. The best size is 8 to 15 — enough for a good discussion, but not large enough to be unwieldy. We feel the regularity of meetings is important, so we continue to have them if there are only four employees present. We have rarely canceled meetings except around Christmas time when hiring is slow. A group larger than 25 becomes a lecture-type meeting, and it is difficult to keep a warm, friendly atmosphere where employees feel free to participate. We want to avoid the cold, impersonal feeling so common to large organizations; we want our employees to feel vital to our operation, and not just a cog in a big machine.

Frequency of meetings depends on the turnover of the work force, the size of the institution, and whether it is a voluntary or compulsory program.

Setting

Plush surroundings are not necessary for an effective orientation meeting. We want our employees to feel comfortable enough to absorb information and ask questions, and not be awed by the furnishings. Lunch room tables with coffee served would be fine, provided there is sufficient space, lighting, ventilation and noise control. Distractions can ruin a meeting.

Scheduling Meetings

Our meeting runs from 75-90 minutes; the shorter period for a small, homogeneous or unresponsive group. The breakdown is something like this:

5-15 minutes - Introduction
15-20 minutes - Organization chart
20-40 minutes - Slides
15-20 minutes - Questions

Sixty minutes are ample, if slides are not used. We have varied the scheduling of meetings; for two years we held the meetings on Fridays at 2:00 p.m.; more recently we have changed to Monday at

1:30 p.m. Scheduling should meet the needs of the institution. We made a survey before changing and found that most new employees were hired on Monday and by Friday were in productive jobs where the departments found it difficult to spare them. We moved the hour closer to lunch so there would be less productive time lost after lunch.

There have been studies showing that employees should be oriented early in their employment, but not the first day. We have tried a variety of scheduling procedures, and do not agree. We have given the program to employees on their first day of employment and to those who have been here over six months. They all learn from it. Occasionally we have special evening showings for employees who miss orientation meeting because of work schedules. The questions of these employees are different from those of new employees, but they are equally interested in the program. The new employee will not retain all the facts presented at such a meeting, but he leaves the meeting with some general information, and will know where to seek help when he needs it.

Voluntary vs. Compulsory

Our program is a voluntary one. In three and a half years, we have had an average 70% response. A voluntary program avoids any feeling of coercion and resentment on the part of employee or supervisor. Sometimes it is too complicated to set up compulsory procedures. On the other hand, programs, where the orientation meeting is made an accepted part of the employment procedure, are also highly successful. If the program is voluntary, attendance will gradually fall off with the pressure of operating responsibilities, and reminders will have to be sent out to departments periodically. If the schedule and program meet department and employee needs, attendance should stay at 65% or better. Any poorer response bears investigation.

How far does the orientation meeting go vs. on-the-job-training? The group meeting is organization-oriented, while on-the-job-training is department-oriented. There is a certain amount of overlap; but this is desirable. A dry-run of an orientation meeting with department heads will resolve questions of overlap and conflicts.

Need For Administrative Support

To be effective, an orientation program must have the support of the top echelon of administration, so that department heads will be encouraged to participate. Anyone not interested in an orientation program is automatically against it, and apathy can kill it. Selling the program is important; it can be accomplished in terms of reducing training costs in departments and of increased efficiency and motivation of employees. It also helps to give the program to management first. An appropriate time to introduce such a program is when the organization is expanding, either in building or in staff, or when the organization is undergoing many changes. We started our program when we were faced with the prospect of integrating several hundred new employees into a new hospital. However, other segments of the campus, much older and better established, are also interested in, and are supporting a similar program for, employees, which is scheduled

every Friday by the Personnel Office.

Visual Aids

The use of colored slides for orientation purposes is not new. Movies are frequently used for training purposes, but they are quite costly. A slide collection can be changed very easily and inexpensively. Camera enthusiasts are usually happy to take pictures for the cost of the film; medical photographers can occasionally use the remainder of a roll of film to shoot new and interesting activities. Public relations' and architects' offices are another source, as well as the personal slide collection of employees.

The use of slides requires a projector and screen, but these, too, can frequently be borrowed from other offices or home hobby shops; even purchase is not prohibitive. The most important advantage to the slide method is its flexibility. When a slide becomes obsolete, it can be easily eliminated or replaced. The projector in its handy carrying case can be easily converted, with many of the same pictures, to public relations uses — talks to community groups, schools, or visitors to the hospital. We plan to use ours on recruiting visits in the community. It would be useful, too, in fund-raising activities.

If you are planning a purchase, we urge selection of a projector with a remote control device. This way you can face your group, yet control the slides appearing on the screen without a projectionist.

An orientation meeting is possible without any visual aids, but their use makes the meeting far more interesting to employees, and it is easier on the discussion leader. A blackboard is fine for explaining personnel policies and organization relationships, but not as good for describing activities and programs. Flannel board and charts can also be used to good advantage.

Content And Approach

We have been asked why we did not tape record a commentary to accompany the slides, to insure uniformity and reduce staff time necessary for the program. We have considered this, and did have a commentary taped for use during a public Open House one year. For new employees, however, we feel it lacks the personal touch. One reason for meeting each new employee at the beginning of the session is to establish rapport and to tailor the program to reach each person. For example, the benefit of taking college-level courses at reduced fee may be of little interest to the janitor, but may be of great interest to the nurse and clinical technician.

Also, our commentary does not remain static. All new information coming into the office is combed, and usable new items are added; others deleted. We have had employees say that the program today is not the same as the one three years ago, which is true, although we cover the same general topics and have the same program goals. This is the challenge of the orientation meeting — to review, evaluate, revise, synthesize, and come up with a meeting which causes one of the sophisticated nursing students, hired for summer work, to comment, "I really wasn't interested in coming to this meeting, but I've learned things about the University I never knew before."

Recently a member of our staff

talked with a group of laundry employees. The turnover in this group is quite low, and most had been to an orientation meeting a year or so earlier. Testing their knowledge and interest in the University and its activities, it was interesting to note how well informed they were; not only did they retain information from that meeting, but they show continued daily interest by scanning newspapers and other publications for new developments in the University.

Evaluation

It is our practice periodically to distribute questionnaires at the conclusion of orientation meetings and to alter later meetings according to the response. This may mean rearranging or eliminating slide material, using other types of visual aids, shortening meetings, altering commentary, etc. Some kind of periodic reappraisal is necessary if the program is not to become stale and listless.

Ninety-seven per cent of those questioned have recommended that other new employees attend such a meeting. When asked, "How was the meeting helpful to you?", they replied: "enlightening and certainly educational;" "gave an over-all picture of what the school is trying to do for the whole state, and not just the students enrolled;" "made me feel more at home and answered questions about the University;" "a revelation about the University of California;" "helped me understand the functions of UCLA better;" "got ideas about my job;" "to get a general over-all picture, which would take a very long time after starting work on one unit;" "it acquainted me with the organization I am working with — I now feel more a part of it and it is more personal to me;" "meetings make one feel as though they are a part and not just thrown out to find everything on their own;" "important information regarding University functions unknown until this meeting".

Occasionally, departments will send key employees to review the program again. These employees comment: "information on Regents and on thinking behind the sick leave system very helpful;" "even though I'm an old employee, I found out many new bits of information;" "I know most of it, but I can now tell new employees of its worthwhileness".

We cannot point to a drastic reduction of turnover, or to a specified percentage increase in employee morale brought about because of an orientation program. Values derived from this kind of program do not lend themselves to conventional yardsticks. Instead, we feel the comments from questionnaires, the high response to the voluntary program, and the strong departmental support are more indicative of the value of the program.

The Stenographic Pool—One University's Approach To Successful Staffing

LOUISE MARTIN

A study, conducted by the author of this article, indicates that a centralized stenographic and clerical pool can be successfully operated if certain requirements in staffing and supervision are met, and that it can result in substantial savings and satisfactory service where peak-loads and emergency situations in clerical services occur.

The use of pooled clerical and stenographic help has been accepted by management in many educational, government, and business institutions as a means of handling peak or emergency demands for clerical, typing, and stenographic assistance in an efficient, economical manner. Personnel men know, however, that this acceptance has been accompanied by problems of selection, training, morale, and turnover that have at times led to questioning of the worth of this type of operation for handling peak-load and emergency office needs. It is generally agreed that capable stenographers and typists who wish full-time work prefer defiinite office assignments to steno pool work. Reasons for this preference center mainly around the desire for clearly-defined duties, explicit responsibilities, better pay, etc., which are not usually associated with steno pool work.

Miss Martin, who is on leave during 1959-1960, serves as Assistant to the Dean of the College of Business Administration, University of Washington. This article is based on a study of the characteristics and attitudes of the personnel in the Stenographic Service Bureau at the University of Washington during the summer and fall of 1958.

At the University of Washington in Seattle, a solution to the problem of recruiting and keeping experienced, competent, and intelligent stenographers and typists in the stenographic service bureau has been found and has contributed to its successful operation for nine years. This solution is the employment of stenographers, typists, and clerical workers on a temporary, part-time, on-call basis rather than on a full-time, permanent basis.

Under this system, flexibility is the keynote of both employment and service to departmental offices of the University. In 1958-59, sixty-five to seventy women were on the active list of those available on call. As many as forty-five, or as few as twenty-five, might be actually working on a given day, depending on the demands for service. Individual shifts varied from four to eight hours per day. Days worked per week varied from one to five. Some of the work was done in the pool office, and some was completed in the offices of the departments requesting help. Even though many offices required additional help at the same time, they could filll their needs by calling the steno pool and giving one day's

notice. This has prevented overstaffing by departments in anticipation of work-load emergencies.

The practice of employing steno pool workers on a flexible workshift basis has unearthed a supply of highly capable clerical workers not ordinarily considered by employers. Hiring women for less than an eight-hour day allows mothers to begin work after they get their children off to school and to return home to supervise their late afternoon activities. These women welcome both the money they can earn and the opportunity to maintain their skills without neglecting their responsibilities to their families. The occasional break between assignments permits the housewife to do periodic cleaning, sewing, baking, etc., to keep the home running smoothly.

From the standpoint of the University administration and its salary budget, a substantial number of requests for additional permanent personnel have been satisfied through channeling such requests through the Personnel Director for possible utilization of steno pool services on a temporary basis. Frequently, departments have cancelled their requests for permanent new positions after emergencies leading to such requests have been taken care of by the steno pool. Another less apparent cost-saving feature has been found in the reduced fringe benefits payable to the part-time, temporary pool employees. Vacations, sick leave, group insurance, and retirement plans do not apply to these workers, and the amount of these costs can be considerable in a large university. The experience of the University of Washington indicates that the absence of these benefits has not prevented a group of highly-motivated, capable women from responding to the need for clerical and stenoghaphic help in times of heavy work-loads and emergencies.

Organization

The Stenographic Service Bureau at the University of Washington is placed in the organization structure of the University under the control and direction of the Non-Academic Personnel Office. The supervisor of the steno pool reports to the Director of Non-Academic Personnel, who is responsible to the President of the University for all personnel functions except those involving academic faculty. The supervisor attends all personnel office staff meetings and confers frequently with the Director of Personnel.

Within the pool, the supervisor is authorized an assistant and four full-time, permanent positions for typists and stenographers. All other employees are on the temporary, on-call basis previously discussed. Responsibilities of the supervisor include setting up procedures; selecting, assigning, and directing the work of all pool employees; preparation of payroll records and invoices for services to departments; and all other activities necessary to the successful operation of the steno pool. The assistant supervisor assumes much of the burden of detail, but the key figure in this operation is that of the supervisor. The position requires the services of a person with superior qualifications of ability, tact, understanding, and emotional maturity.

Functions

The general function for which this operation was established is to

furnish temporary typing, stenographic, and clerical assistance to all offices and departments of the University during peak or emergency periods of activity. More specifically, in performing its function, the steno pool can provide these services:

1. Taking dictation and transcribing shorthand notes, either in the pool office or in departmental offices.
2. Transcribing from machines, tapes, belts, disks, etc., all types of dictated material.
3. Automatic typing of multiple original copies on the electric autotypist.
4. Typing single original and carbon copies from long-hand or typed rough draft material.
5. Statistical typing — reports, tables, charts, etc.
6. Typing stencils or other types of masters for machine duplication or printing.
7. Filing, sorting, posting, and other clerical duties in departmental offices.
8. Registering delegates, collating registration materials, acting as receptionists, and other similar duties at meetings, conventions, and seminars conducted at the University.

Costs

The cost of setting up a stenographic service bureau will vary with the location of the university or college, its size, the variations in work-load, and other factors. Assuming the availability of space with adequate lighting and power outlets, proper ventilation, and easy accessibility, the equipment costs will be the important items in the initial budget. The number of desks, chairs, desk lamps, and typewriters will depend upon the staff contemplated and the amount of work that will be done in the pool office as opposed to that done in the departmental offices. Expenditures for these items can sometimes be justified on an overall basis as having to be purchased by departmental offices if new employees are hired directly by them for permanent assignments. In effect, the cost to the University or College is no greater.

Admittedly, the original cost of equipment will be substantial, but this cost can be offset in a few years of efficiently operated steno pool service in terms of the reduced number of permanent positions established and fuller utilization of the time of stenographers and clerical employees.

Once the steno pool is established, the wages of its personnel will be offset by charges to the campus departments using the service. The charge to the department will be slightly higher than the hourly wage paid to the employee. The additional charge is made to cover lost time and costs of repair to equipment, etc. At the University of Washington, the salary of the supervisor is charged to the budget of the Non-Academic Personnel Office, since it is felt that her services contribute to the overall personnel effectiveness of the University.

Supervisory Problems

The writer of this article conducted an attitude survey and studied the characteristics of the employees of the Stenographic Service Bureau at the University of Washington in an effort to determine characteristics and attitudes which might account for the successful operation of this stenographic pool over a period of years.

Having read in the literature concerning other stenographic pools, of the difficulties encountered, the researcher concerned herself with questions which might reveal methods of handling problems of poor motivation, careless work performance, high turnover, and other reported defects of pool operation.

From this study, two conclusions emerged. First, the selection of a pool supervisor must be very carefully undertaken. Since strong inter-personal relationships are not formed by pool employees in the departments to which they are temporarily assigned, their loyalty and identification is with the pool and primarily with the supervisor because of limited contact with other pool employees. This relationship calls for a supervisor of unquestioned ability; tremendous understanding and tact in dealing with both departmental users of the service and the workers whose assignments are frequently less than satisfyying to their needs for recognition; and a high level of organizational and supervisory skill. The presence or absence of the right kind of supervisor can make or break the success of the operation in the opinion of this writer.

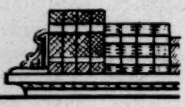
The second conclusion reached on the basis of this study is that the employment of women on a temporary, on-call, hourly basis is the most effective way to obtain highly qualified persons who will be content with the kind of work usually required of steno pool employees. In their responses to the question, "What do you like best about working for the Steno Pool?", flexibility of the hours was mentioned by 92% of the individuals interviewed. Perhaps the most convincing evidence of this was their almost unanimous indication that they would not accept full-time permanent employment, either on or off campus, if it were offered them. The most often stated reason (50% of the respondents) was "family responsibilities". For this particular group of stenographers, typists, and clerical workers, steno pool work was ideally suited to their needs and circumstances, and they wished to continue it. Furthermore, the study revealed that the most satisfactory employees in terms of length of service and the supervisor's evaluation of their performance were women thirty-five years of age or older who had children of school age and whose husbands were employed. This group can only be obtained on a flexible workshift basis.

The above conclusions, if followed, will effectively take care of the most often-quoted problems of stenographic pool supervision — poor morale, incompetent workers, and high turnover. Other problems, such as those of selection and training, will also be minimized.

Summary

A centralized stenographic and clerical pool can be successfully operated if its requirements are adjusted to attract married women of 35 or older whose home responsibilities do not permit them to work on a permanent, full-time basis, and if the supervision of the steno pool is of high caliber in ability and emotional maturity. Such a stenographic service can result in substantial savings in the cost of employment of clerical workers and in highly satisfactory service to departmental offices where peak-loads of clerical work and emergency situations occur.

CUPA'S Book Shelf



Readings in Personnel Administration, edited by Paul Pigors and Charles A. Myers, Industrial Relations Section, Department of Economics and Social Science, Massachusetts Institute of Technology; and F. T. Malm, School of Business Administration, University of California, Berkeley. Second Edition, 1959. McGraw-Hill Book Company, Inc., 330 West 42nd Street, New York 36, N. Y. 554 pp. Cloth-bound edition: $6.50; Paper binding: $4.95.

This book is designed as a supplement for basic personnel textbooks. It contains reprints of articles by practitioners and by social scientists in the major areas of modern personnel administration. Most of the articles are presented in full, thus preserving the authors' ideas, viewpoints, and methodology.

The recent second edition incorporates more than 20 selections not included in the previous edition, published in 1952. Among the topics presented in these new articles are changing management philosophies; problems resulting from technological developments, including automation; fringe benefits; and employee participation in the operation of business enterprises. New charts and graphs introduced in the second edition assist the reader to interpret and evaluate conclusions presented in the accompanying text.

Articles which may be of considerable interest to college and university personnel officers include the following: "Line and Staff in Industrial Relations"; "Use of Tests in Employee Selection"; "Starting the New Employee"; "Three Types of Appraisal Interview"; "Bases for Sound Salary Determination"; "Factors in the Successful Operation of Job-Evaluation Programs"; "Automation: A New Dimension to Old Problems"; "Fringe Benefits: Do We Know Enough about Them?"; "Preparing Employees for Retirement."

Although most of the case studies and examples cited are drawn from the area of personnel administration in industry, many of the principles and procedures discussed are applicable to colleges and universities. More bibliographical references to related material on some of the topics discussed might have been helpful.

The compilation includes 44 articles, a few published posthumously. These contributions date from 1933 through 1958. Inclusion of some of the earlier material may be questioned, but it is probably justified as contributing background for understanding and interpreting more recent developments. Articles or excerpts are reprinted from 12 books and pamphlets, 15 periodicals, and proceedings of three management conferences. A number of the articles reflect results of research conducted by various educational institutions, including the University of California (Berkeley), Massachusetts Institute of Technology, University of Michigan, Princeton University, and Yale University.

Contributing authors include 22 members of college and university faculties, nine representatives of management research and consulting organizations, six business executives, three representatives of government agencies, two magazine editors, and one labor union representative. Some personnel officers might prefer more contributions by authors actively en-

gaged in personnel administration. Many of the academic contributors, however, have been retained as consultants by industry. Moreover, it is probable that personnel administrators have not been as prolific as teachers in writing about their ideas and experience.

Few personnel officers could afford the time necessary for careful reading of this entire text. As a ready reference, to be consulted when new problems arise, it should prove helpful.

Employment Interviewing, by Milton M. Mandell, Standards Division, Bureau of Programs and Standards, U. S. Civil Service Commission; Joseph Brooks; and Sally H. Greenberg. Personnel Methods Series No. 5. June, 1956. 103 pp. Paper binding. Available from Superintendent of Documents, U.S. Government Printing Office, Washington 25, D.C. Price: 40 cents.

Although this text was prepared several years ago, it contains much information of current interest to the employment interviewer and to the personnel administrator who is responsible for the interviewing function. The authors make the basic assumption that interviewing is an art rather than a science. It follows that there is no single pattern with which to compare an actual employment interview and no single yardstick by which to measure the interviewer's accomplishment.

Since conducting employment interviews is one of the most complex of all personnel assignments, thorough training and preparation of the interviewer are essential if the interview is to accomplish its objective. The stated purpose of the pamphlet is to help those who possess the basic aptitude for employment interviewing to increase their skill and their effectiveness.

The interview is described as a useful and valid device for determining which applicants are best qualified for employment or promotion, but the authors contend that it should not be considered the sole criterion. It is reasonable to assume that the validity of the interview depends not only upon the skill of the interviewer, but upon the characteristics of the person being interviewed. Therefore, the interview deserves more weight as a selection device in filling positions where inter-personal relationships are vital than in situations where other skills are more important.

Three basic elements in effective interviewing procedure are described in detail: preparing the interviewer; conducting the interview; interpreting and summarizing the information obtained. The following chapter headings indicate the content of the text: "Types of Employment Interviews"; "What to Evaluate"; "Conduct of the Individual Interview"; "Evaluating the Applicant"; "Selection and Training of Interviewers". The appendix includes a sample "practice interview" and several specimen interview rating forms.

"The Application Form Revisited" by Gilmore J. Spencer, The McMurry Company, Chicago. **Personnel,** Sept.-Oct., 1959.

Almost every business has an application blank which job applicants are required to fill out at some stage in the selection process. There is a wide variation among application blanks, both in physical arrangement and in the type of information required. In many

organizations, the only reason why the application blank assumes its present form is because "we've always done it that way".

Many applications are stacked away in inactive files or regarded as a source of information which may become useful at some indefinite future time. In most cases, the application blank has ceased to function as a selection tool. The supervisor who is responsible for selecting a new employee examines it superficially. This author suggests that many personnel officers are neglecting an opportunity to design an application blank which will be more useful in selecting the best available applicants for specific jobs.

Some application blanks, because of space limitations and the type of questions asked, restrict the applicant's initiative and channel his answers into a pre-determined pattern. Others encourage spontaneous comments which reflect personality characteristics. The rigid type of application blank may be more convenient for record-keeping or statistical analysis. The flexible type is a more reliable guide in selecting new employees. The facts an applicant chooses to supply, as well as their organization, form, and content, may provide significant clues to his personality. His responses often indicate the presence or absence of energy, aggressiveness, oral skills, and narcissism (seeking compliments, personal recognition, and attention). They also reflect his social and cultural background. It is possible to design an application form which will identify many of the qualifications essential for success in a given occupation.

The author compares the application blank with the psychological test as a selection device. In some organizations, he suggests, a properly designed application form might serve a purpose similar to that which is currently accomplished by a battery of tests; or, at least, it might supplement and interpret test results. Most tests, he observes, measure only a limited number of basic personality traits. Test predictions are primarily actuarial. They indicate the approximate percentage of successes or failures to be expected in a group of applicants, but they are less reliable in determining the qualifications of an individual. Moreover, testing may be an expensive procedure because trained technicians are needed to interpret the significance of test scores.

This article describes a device for increasing the productivity of a personnel office which is so simple that it is often overlooked. However, redesigning the application blank and interpreting information submitted on the new form are not appropriate assignments for an amateur. These tasks require skills somewhat comparable to those applied in constructing an adequate placement test and evaluating test results.

Reviews by Robert Mears.